

Bowen Basin population report, 2025

Introduction

The resource sector in regional Queensland utilises fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) workers as a source of labour supply. These non-resident workers live in regional areas while on-shift. The Australian Bureau of Statistics' (ABS) resident population estimates for these areas do not include non-resident workers.

The non-resident population represents the number of FIFO/DIDO workers who are on-shift in the region at a given point in time. This group includes those employed in construction, production and maintenance at mining and gas industry operations, related infrastructure operations and renewable energy projects.

This report provides non-resident population estimates for the Bowen Basin during the last week of June 2025. It also includes full-time equivalent (FTE) population estimates, which aggregate the resident and non-resident populations to provide a more complete indicator of demand for certain services.

Estimates within this report are derived primarily from the annual Survey of Accommodation Providers conducted by the Queensland Government Statistician's Office (QGSO). The survey includes worker accommodation villages (WAVs), hotels, motels, and caravan parks.

Key findings

Key findings of this report include:

- The Bowen Basin's non-resident population in June 2025 (24,745 persons) was the highest recorded since the peak of the resource construction boom in June 2012 (25,035 persons).
- The region's non-resident population grew by 920 persons (or +4%) between June 2024 and June 2025.
- Growth in 2024–25 was driven by a combination of increased activity at some mines and renewable energy project construction. Non-resident workers on-shift engaged in production at existing coal mines continued to comprise the majority of the non-resident population in June 2025.
- At the LGA level, Isaac had the largest non-resident population in the Bowen Basin in June 2025 (16,605 persons or 67% of the region's total). The remaining non-resident population was in Central Highlands (5,460 persons or 22%), Banana (2,010 persons or 8%) and Whitsunday (Bowen only) (670 persons or 3%).

continued

Figure 1 Bowen Basin region



The Bowen Basin — at a glance

The Bowen Basin (Figure 1) is Queensland's most important source of coking coal. The region comprises the local government areas (LGAs) of Banana, Central Highlands, Isaac and Whitsunday (Bowen only).

Estimated population at June 2025:

Non-resident population.....	24,745
Resident population.....	83,740
Full-time equivalent population....	108,485

- Three of the four LGAs in the Bowen Basin recorded non-resident population growth in the year to June 2025—Isaac (+790 persons, +5%), Whitsunday (Bowen only) (+155 persons, +30%) and Banana (+65 persons, +3%). In contrast, the non-resident population of Central Highlands declined over this period (–100 persons, –2%).
- The estimated FTE population of Bowen Basin was 108,485 persons in June 2025, comprising 83,740 residents and 24,745 non-resident workers on-shift.
- The majority of non-resident workers on-shift in the region in June 2025 were housed in WAVs (22,125 persons or 89% of the region's non-resident population). The remaining non-resident workers (2,620 persons or 11%) stayed in other accommodation such as hotels/motels and caravan parks.
- The region's WAV bed capacity totalled 31,725 beds in June 2025, an increase of 1,850 beds over the year.

Non-resident population

The Bowen Basin in Central Queensland (Figure 3, page 6) contains most of Australia's high quality metallurgical coal reserves, as well as significant deposits of thermal coal. As at June 2025, there were 47 coal mines and one metalliferous mine in operation in the region, along with coal seam gas (CSG) and conventional gas operations, and related infrastructure operations (Table 5, pages 9–10).

At the end of June 2025, the Bowen Basin's non-resident population was estimated at 24,745 persons, an increase of 920 persons (or +4%) from June 2024 (Table 1).

Similar to 2024, two-thirds (67%) of non-resident workers on-shift in the region in June 2025 were counted in Isaac (16,605 persons), with the remainder recorded in Central Highlands (5,460 persons or 22%), Banana (2,010 persons or 8%) and Whitsunday (Bowen only) (670 persons or 3%).

At the LGA level, Isaac recorded the largest non-resident population growth in 2024–25 (790 persons or +5%), driven by construction associated with renewable energy projects and increased activity at some mines. The non-resident population of Whitsunday (Bowen only) increased by 155 persons (or +30%), reflecting increased activity at some operations. Banana grew by 65 persons (or +3%), largely due to an increase in gas activity. In contrast, Central Highlands recorded a decrease of 100 persons (or –2%), due to a moderation in gas and coal activity.

Non-resident population

The non-resident population is the number of fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) workers who are living in the area of their workplace temporarily, and who have their usual place of residence elsewhere.

Due to shift arrangements, not all members of the non-resident workforce are present in the local area at one time. For that reason, the non-resident population refers to the number of non-resident workers on-shift at a given point in time, rather than the total non-resident workforce.

Table 1 Non-resident population, Bowen Basin LGAs, as at June

LGA	2024	2025	Change, 2024 to 2025	
	— persons —		persons	%
Banana	1,945	2,010	65	3
Central Highlands	5,555	5,460	–100	–2
Isaac	15,810	16,605	790	5
Whitsunday (Bowen only)	515	670	155	30
BOWEN BASIN TOTAL	23,825	24,745	920	4

Figures in tables in this report have been rounded to the nearest five; see Notes at end of report for details.

Source: QGSO estimates

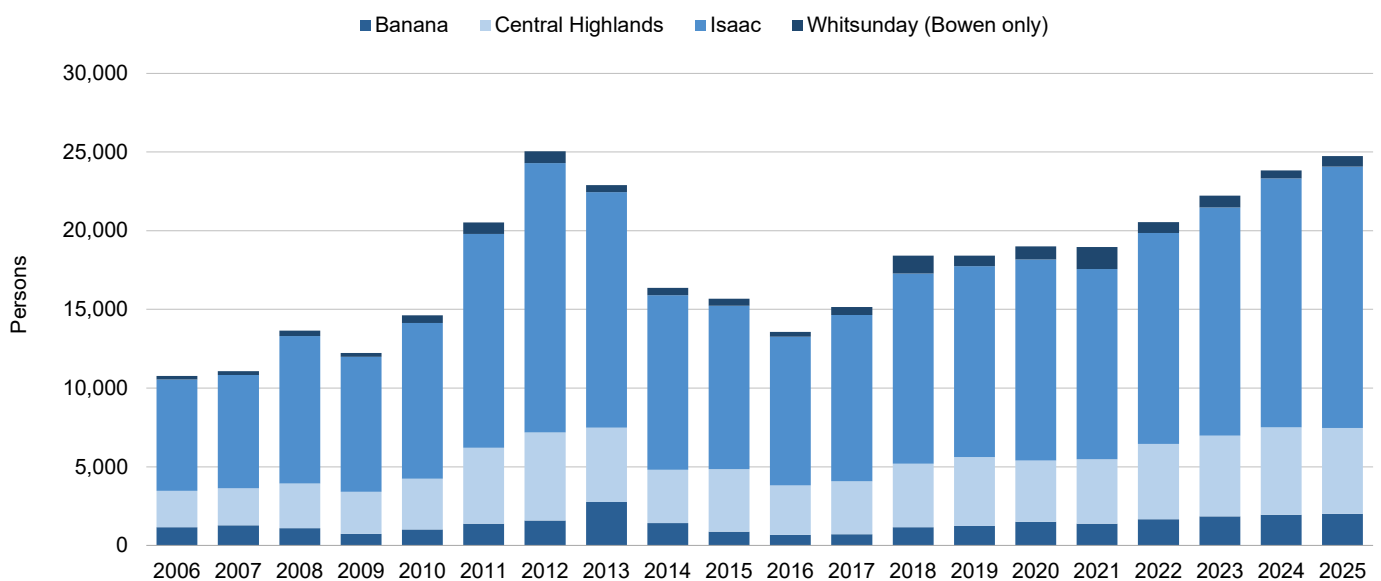
As Figure 2 shows, the Bowen Basin's non-resident population increased from 10,765 persons in 2006 to a peak of 25,035 persons in 2012. This growth was driven by the construction of major resource projects, including new coal mines, mine expansions, and infrastructure associated with major gas developments. The subsequent decline to 13,560 persons in 2016 reflects the transition to the production phase as large, temporary construction workforces were replaced by smaller operational workforces.

Increases in the region's non-resident population between 2016 and 2018 were associated with expanded coal production and projects to sustain ongoing operations rather than major project construction, as mining companies responded to high metallurgical and thermal coal prices. From 2018 to 2021, the Bowen Basin's non-resident population remained relatively stable (between 18,410 persons and 19,005 persons), with ongoing coal production being the main influence on numbers. A variety of other factors—including mine, rail and renewable energy project construction, gas development, and maintenance events—also contributed to the non-resident population in different years and in different LGAs.

Since 2021, the Bowen Basin's non-resident population has grown each year. Coal mining has continued to account for the bulk of industry activity and employment in the region over this period, with non-resident population growth driven largely by expanded activities at existing coal mines, rather than major project construction.

Growth in 2024–25 (920 persons) brought the region's non-resident population in June 2025 to the highest level recorded since the peak of the resource construction boom in 2012. This recent increase was due to a combination of influences, with increased numbers at some coal mines, including project construction and maintenance activity underway at some sites. Workers engaged in renewable energy project construction in Isaac LGA also made a substantial contribution to non-resident population growth.

Figure 2 Non-resident population, Bowen Basin LGAs, as at June



Source: QGSO estimates

Full-time equivalent (FTE) population

In June 2025, the estimated FTE population of the Bowen Basin was 108,485 persons, comprising 83,740 residents and 24,745 non-resident workers on-shift (Table 3, page 5). Non-resident workers on-shift made up 23% of the region's total FTE population.

Isaac had the region's largest FTE population in June 2025 (40,060 persons), with 16,605 non-resident workers on-shift accounting for 41% of its FTE. The FTE population of Central Highlands was 35,140 persons, with a smaller number and proportion of non-resident workers on-shift (5,460 persons or 16% of its FTE) than in Isaac.

Full-time equivalent population

The FTE population measure is the sum of the resident population (people who live in the area permanently) and the non-resident population (i.e. the number of non-resident workers on-shift).

The FTE population measure provides a more complete estimate of total demand for certain services and infrastructure in regions with a high incidence of FIFO/DIDO workers.

Non-resident population distribution

In June 2025, more than half of the Bowen Basin's non-resident population was counted in town (13,090 persons or 53%), with the balance in rural areas (11,655 persons or 47%) (Table 2). Four urban centres and localities (UCLs) had non-resident populations of 1,000 persons or more—Moranbah (2,625 persons), Dysart (2,355 persons), Blackwater (2,350 persons) and Middlemount (1,585 persons) (Table 3, page 5).

The Bowen Basin's rural non-resident population increased by 615 persons in the year to June 2025. The number of non-resident workers on-shift counted in town also grew, up by 305 persons, over this period.

At the LGA level, Isaac and Whitsunday (Bowen only) recorded non-resident population growth both in town and in rural areas in 2024–25, with particularly notable growth in rural areas of Isaac (770 persons). In Banana, rural areas also grew while the non-resident population in town decreased. In contrast, in Central Highlands, the number of non-resident workers on-shift in town increased, but numbers in rural areas declined.

Table 2 Non-resident population distribution^(a), Bowen Basin LGAs, as at June

LGA	In town	Rural areas	Total	In town	Rural areas	Total
	2025			Change, 2024 to 2025		
	— persons —					
Banana	1,070	940	2,010	-105	170	65
Central Highlands	3,890	1,570	5,460	235	-330	-100
Isaac	7,495	9,110	16,605	25	770	790
Whitsunday (Bowen only)	640	35	670	150	5	155
BOWEN BASIN TOTAL	13,090	11,655	24,745	305	615	920

(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

Table 3 FTE population estimates, Bowen Basin LGAs and selected UCLs, June 2025

LGA	Location ^(a)	UCL	Resident population ^(b)	Non-resident population	FTE population
			— persons —		
Banana	In town	Baralaba	270	185	450
		Biloela	5,870	420	6,290
		Moura	2,075	440	2,515
		Taroom	585	20	605
		Other towns ^(c)	730	10	735
	Rural areas		5,655	940	6,595
	<i>Banana total</i>			15,185	2,010
Central Highlands	In town	Blackwater	4,895	2,350	7,245
		Bluff	250	195	445
		Capella	1,005	40	1,040
		Emerald	15,360	555	15,920
		Springsure	750	75	825
		Tieri	805	670	1,475
		Other towns ^(c)	1,355	5	1,360
	Rural areas		5,260	1,570	6,830
<i>Central Highlands total</i>			29,680	5,460	35,140
Isaac	In town	Clermont	2,215	130	2,345
		Dysart	2,915	2,355	5,265
		Glenden	475	440	915
		Middlemount	1,940	1,585	3,525
		Moranbah	9,520	2,625	12,145
		Nebo	705	365	1,070
	Rural areas		5,690	9,110	14,800
<i>Isaac total</i>			23,455	16,605	40,060
Whitsunday (Bowen only)	In town	Bowen	11,030	75	11,105
		Collinsville	1,405	535	1,940
		Other towns ^(c)	535	25	560
	Rural areas		2,455	35	2,485
<i>Whitsunday (Bowen only) total</i>			15,420	670	16,090
BOWEN BASIN TOTAL			83,740	24,745	108,485

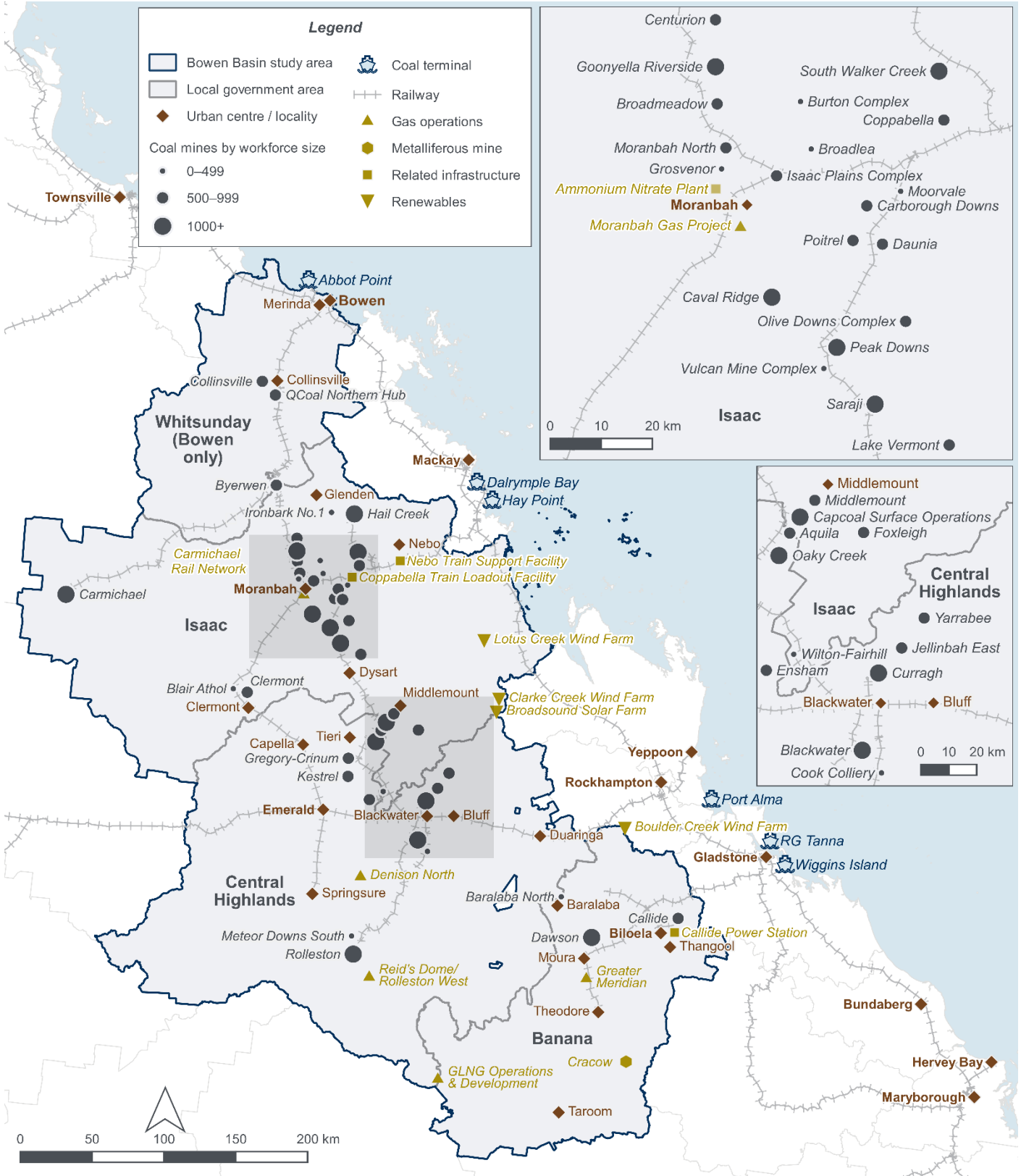
(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

(b) QGSO unpublished data – provisional and subject to revision.

(c) UCLs with only one accommodation provider or fewer than 20 non-resident workers are aggregated in 'Other towns'.

Sources: QGSO, 2025

Figure 3 Existing resource operations and projects under construction^(a), Bowen Basin, June 2025



(a) Coal mines by workforce size are based on numbers at June 2025 published by Resources Safety and Health Queensland (RSHQ), rather than confidential QGSO data. Operation and project locations shown in map are indicative only. See Table 5 (pages 9–10) for a full list of existing operations and projects by LGA.

Sources: RSHQ, 2025; QGSO, 2025

Non-resident worker accommodation

Most non-resident workers on-shift in the Bowen Basin stayed in worker accommodation villages (WAVs), which housed 22,125 persons, or 89% of the region's non-resident population in June 2025 (Table 4). Other types of accommodation, including hotels/motels and caravan parks, accounted for the remainder (2,620 persons or 11%). Across the region, WAVs are located both in rural areas and in town, while other establishments (hotels/motels and caravans) are mostly located in town.

Worker accommodation villages (WAVs)

WAVs are commonly used to house non-resident workers on-shift. WAVs typically consist of demountable dwellings arranged in a village, with common dining, laundry and recreational facilities.

The number of non-resident workers on-shift in the Bowen Basin accommodated in WAVs increased by 1,625 persons in the year to June 2025, while the number staying in other accommodation decreased (-705 persons) over this period.

At the LGA level, all LGAs recorded increased numbers of non-resident workers on-shift in WAVs in 2024-25, with relatively large growth in Isaac (1,175 persons). In contrast, the non-resident population staying in other accommodation fell in three of the four LGAs in the region. The exception was Whitsunday (Bowen only), which recorded an increase of 75 persons in other accommodation.

Table 4 Non-resident population by accommodation type, Bowen Basin LGAs, as at June

LGA	2025			Change, 2024 to 2025		
	WAVs	Other ^(a)	Total	WAVs	Other ^(a)	Total
	— persons —					
Banana	1,415	595	2,010	240	-175	65
Central Highlands	4,755	705	5,460	120	-220	-100
Isaac	15,475	1,130	16,605	1,175	-385	790
Whitsunday (Bowen only)	480	195	670	85	75	155
BOWEN BASIN TOTAL	22,125	2,620	24,745	1,625	-705	920

(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

Source: QGSO estimates

WAVs have been the predominant type of non-resident worker accommodation used in the Bowen Basin since monitoring began in 2006, with much smaller numbers in other accommodation (Figure 4, page 8). Other accommodation types including hotels, motels and caravan parks often cater for additional workers requiring accommodation in periods of high demand from the resources sector.

WAVs have several advantages over other types of accommodation for housing non-resident workers, including economies of scale for large workforces, the flexibility to expand or contract capacity with changing workforce demand, and the ability to house workers on or near work sites in rural areas. The number of WAV beds across the region varies from year to year as camps open, close (either temporarily or permanently), and change in size in response to demand from industry and the needs of specific projects.

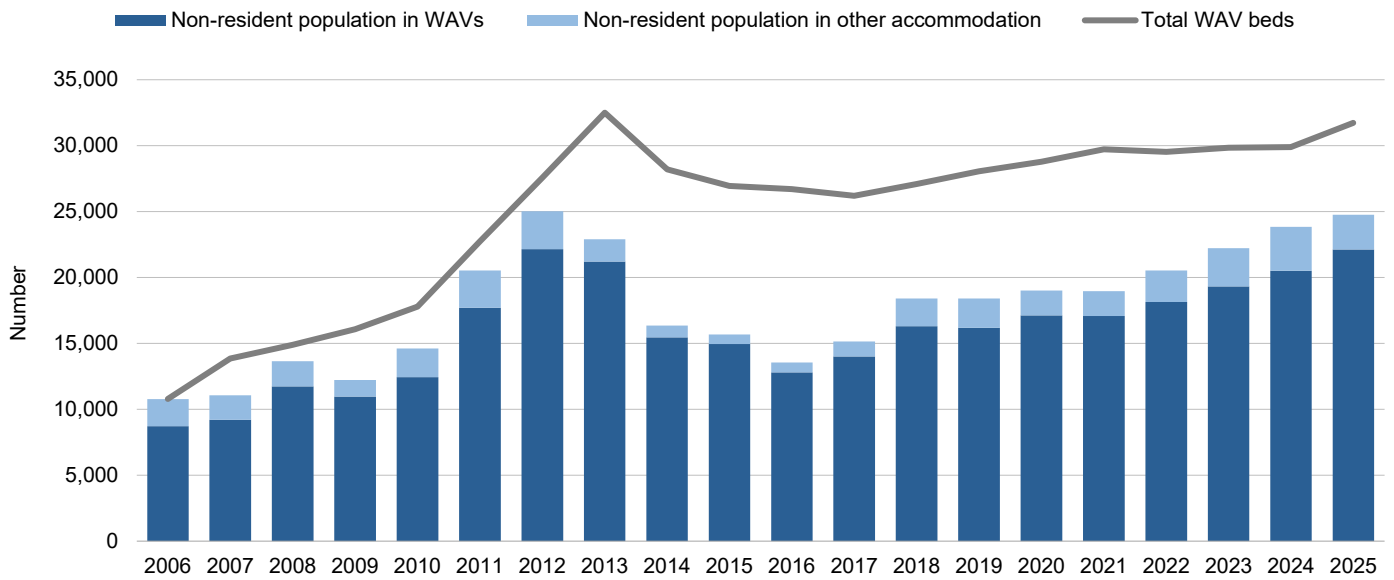
As Figure 4 shows, the number of WAV beds in the region increased along with non-resident population growth over the period leading up to June 2012 and continued to increase in the year to June 2013 despite the decrease in the non-resident population. Rapid growth leading to the peak in 2013 was driven by new camps catering for the large, temporary construction workforces of major gas pipeline and coal projects.

Since 2013, the number of WAV beds in the region has varied over time but remained at a comparatively high level due to ongoing demand for WAV accommodation from operational workforces. The noticeable difference

between the number of WAV beds and number of non-resident workers on-shift for much of this period does not necessarily indicate surplus bed availability, as many establishments reserve rooms for workers when they are rostered off.

WAV bed capacity in the Bowen Basin totalled 31,725 beds in June 2025, an increase of 1,850 beds over the year. This relatively large net gain was largely due to beds in new WAVs catering for renewable energy project construction, CSG and coal workers.

Figure 4 Non-resident population by accommodation type^(a) and WAV bed capacity, Bowen Basin, as at June



(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

(b) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

Table 5 Existing resource operations and projects under construction^(a), Bowen Basin, June 2025

Category	Operation / project name	Company name	LGA
RI	Abbot Point Operations	Abbot Point Bulkcoal	Whitsunday (Bowen only)
CM	Aquila	Anglo American	Isaac
CM	Baralaba North	Baralaba Coal Company	Banana
CM	Blackwater	Whitehaven Coal	Central Highlands
CM	Blair Athol	TerraCom	Isaac
RE	Boulder Creek Wind Farm	Aula Energy	Banana, Rockhampton ^(b)
CM	Broadlea	Fitzroy Mining Operations	Isaac
CM	Broadmeadow	BHP	Isaac
RE	Broadsound Solar Farm	Iberdrola Australia	Isaac
CM	Burton Complex	Bowen Coking Coal	Isaac
CM	Byerwen	QCoal Group	Isaac
CM	Callide	Batchfire Resources	Banana
RI	Callide Power Station	CS Energy	Banana
CM	Capcoal Surface Operations	Anglo American	Isaac
CM	Carborough Downs	Fitzroy Mining Operations	Isaac
CM	Carmichael	Bravus Mining and Resources	Isaac
RI	Carmichael Rail Network	Bowen Rail Company	Whitsunday (Bowen only)
CM	Caval Ridge	BHP	Isaac
CM	Centurion	Peabody Energy	Isaac
RE	Clarke Creek Wind Farm	Squadron Energy	Isaac
CM	Clermont	Glencore Coal	Isaac
CM	Collinsville	Glencore Coal	Whitsunday (Bowen only)
CM	Cook Colliery	Constellation Mining	Central Highlands
CM	Coppabella	Peabody Energy	Isaac
RI	Coppabella Train Loadout Facility	Pacific National	Isaac
MM	Cracow Gold Mine	Aeris Resources	Banana
CM	Curragh	Coronado Coal	Central Highlands
CM	Daunia	Whitehaven Coal	Isaac
CM	Dawson	Anglo American	Banana
CSG	Denison North (Rolleston)	Denison Gas	Central Highlands
CM	Ensham	Ensham Resources	Central Highlands
CM	Foxleigh	Middlemount South	Isaac
CSG	GLNG Operations and Development	GLNG ^(c)	Banana, Central Highlands
CM	Goonyella Riverside	BHP	Isaac
CSG	Greater Meridian	WestSide Corporation	Banana
CM	Gregory-Crinum	Sojitz Blue	Central Highlands
CM	Grosvenor ^(d)	Anglo American	Isaac

Category	Operation / project name	Company name	LGA
CM	Hail Creek	Glencore Coal	Isaac
CM	Ironbark No. 1	Fitzroy Mining Operations	Isaac
CM	Isaac Plains Complex	Stanmore Resources	Isaac
CM	Jellinbah East	Jellinbah Group	Central Highlands
CM	Kestrel	Kestrel Coal Resources	Central Highlands
CM	Lake Vermont	Jellinbah Group	Isaac
RE	Lotus Creek Wind Farm	CS Energy	Isaac
CM	Meteor Downs South	Sojitz Blue	Central Highlands
CM	Middlemount	Middlemount Coal	Isaac
CM	Moorvale	Peabody Energy	Isaac
RI	Moranbah Ammonium Nitrate Plant	Dyno Nobel	Isaac
CSG	Moranbah Gas Project	QPM Energy	Isaac
CM	Moranbah North	Anglo American	Isaac
RI	Nebo Train Support Facility	Pacific National	Isaac
CM	Oaky Creek	Glencore Coal	Central Highlands
CM	Olive Downs Complex	Pembroke Resources	Isaac
CM	Peak Downs	BHP	Isaac
CM	Poitrel	Stanmore Resources	Isaac
CM	QCoal Northern Hub	QCoal Group	Whitsunday (Bowen only)
CSG	Reid's Dome/Rolleston West	State Gas	Central Highlands
CM	Rolleston	Glencore Coal	Central Highlands
CM	Saraji	BHP	Isaac
CM	South Walker Creek	Stanmore Resources	Isaac
CM	Vulcan Mine Complex	Vitrinite	Isaac
CM	Wilton-Fairhill	Futura Resources	Central Highlands
CM	Yarrabee	Yancoal Australia	Central Highlands

CM = coal mine CSG = coal seam / conventional gas MM = metalliferous mine RE = renewable energy RI = related infrastructure

- (a) Includes coal mining operations, metalliferous mines, gas operations, resource industry related infrastructure, and projects under construction as at June 2025. Operations that have ceased production or were in care and maintenance, including Bluff in Central Highlands, Millennium and Newlands in Isaac, and Mt Carlton in Whitsunday (Bowen only) are not included in this list.
- (b) Boulder Creek Wind Farm is predominantly located in Rockhampton LGA, which is out of scope.
- (c) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.
- (d) Mining operations at Grosvenor remained suspended in June 2025 following an underground fire in June 2024 (Anglo American, 2025).

Source: QGSO 2025

Notes

LGA – local government area UCL – urban centre and locality

Place names refer to local government areas unless otherwise specified.

Whitsunday (Bowen only) comprises the statistical areas level 2 (SA2s) of Bowen and Collinsville, which cover the area of former Bowen Shire.

Data in this report are derived from surveys conducted by QGSO in 2025 and other sources. The Survey of Accommodation Providers counted non-resident workers staying in worker accommodation villages (WAVs), hotels, motels, caravan parks and other commercial accommodation during the last week of June 2025. Short-term and overnight visitors are not regarded as non-resident workers. The Resource Employment Survey collected workforce information from all resource companies with existing operations and projects in the Bowen Basin as at June 2025.

Non-resident workers are people who fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work and live in the area temporarily while rostered on, and who have their usual place of residence elsewhere. This group includes employees, contractors and associated sub-contractors, employed in construction, production, and maintenance at mining and gas industry operations and projects, renewable energy projects and resource-related infrastructure. Figures in this report refer to the number of non-resident workers on-shift, or present in the area at a given point in time and should not be confused with total non-resident workforce numbers.

Non-resident population data presented in this report are a point-in-time measure, based on the best information available at the time of the surveys. Non-resident worker numbers may vary in response to changing production demands, prevailing weather and industrial disputes. At the time of the 2025 surveys, the number of non-resident workers on shift in the Bowen Basin was unaffected by widespread adverse weather events or industrial action.

Resident population estimates for 2025 are unpublished QGSO estimates, which are provisional and subject to revision.

'In town' includes populations counted in defined urban centres and localities (UCLs), as well as non-resident workers housed within 5km of town. 'Rural areas' include populations outside of defined UCLs, including non-resident workers more than 5km from town.

'Other' accommodation includes hotels, motels, caravan parks and other private rental accommodation.

Figures in tables have been rounded to the nearest five. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those that could be derived from the rounded figures.

Sources

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